FDMS ADMIN 1.1
Release Notes

Release Date: July 28, 2016

Contents

Release Summary

The FDMS Admin 1.1 Release is the second release of the new FDMS Admin Module. This release focuses on implementing Access Requests, Lockouts, Reports and Secondary User Accounts functionalities. FDMS 3 remains available for Agency Administrators and Records Managers until **September 30, 2016**. After September 30, 2016, agencies must contact the Help Desk to complete any actions not available in the FDMS Admin Module or FDMS 4. The primary features included in this release are:

- Access Requests
- Lockouts
- Reports
- Secondary User Accounts
- Footer added throughout the site

Access Requests

Logging into the application defaults Agency Administrators to the *Access Requests* screen. The screen displays a table similar to existing screens in the application which can be sorted by column using the *sort* arrows and searched using the *Search* box. By default, the *Access Requests* screen is sorted by *Requestor, Ascending*. The screen includes columns with the contact information for the Requestor, the access level requested, and the date they requested the new account.

Figure 1 - Access Requests Screen Default upon Login

Figure 2 - Access Requests Sort Arrows and Default Sort By

Figure 3 - Access Requests Search Box

Clicking on the *Requestor* changes the display to the *User Information* screen where the Agency Administrator can review and update the User Information including the *Access Level*. The Agency Administrator can *Approve* or *Deny* the new account from this screen. Either option will send the *Requestor* an email. If the account is approved, the email contains a link to activate the account. If the account is denied, the email informs the user of the denial.

Figure 4 - Access Request User Information

Lockouts

The *Lockouts* screen displays a list of Agency users that are locked out of the system due to one of the following reasons:

- **Locked (Unused)** - Accounts are locked after 30 days of non-use. Resetting unlocks the account so the user can login again.
- **Locked (Invalid Logins)** - Accounts are temporarily locked for 30 minutes after 5 invalid login attempts. Resetting sends the user an email with one-time login credentials.
- **PW Expired** - Passwords expire if a user does not change it within 60 days. Resetting sends the user an email with one-time login credentials.

Agency Administrators can sort and search this screen in the same manner as described in the *Access Requests* section above.

Figure 5 - Lockouts Screen

An Agency Administrator can *Reset* an account that is locked out for any user role in the system; including other Agency Administrators. The *Reset* button is located on the *User Information* screen. Initiating a *Reset* sends the user an email with a link to change their password or reactivate their account.

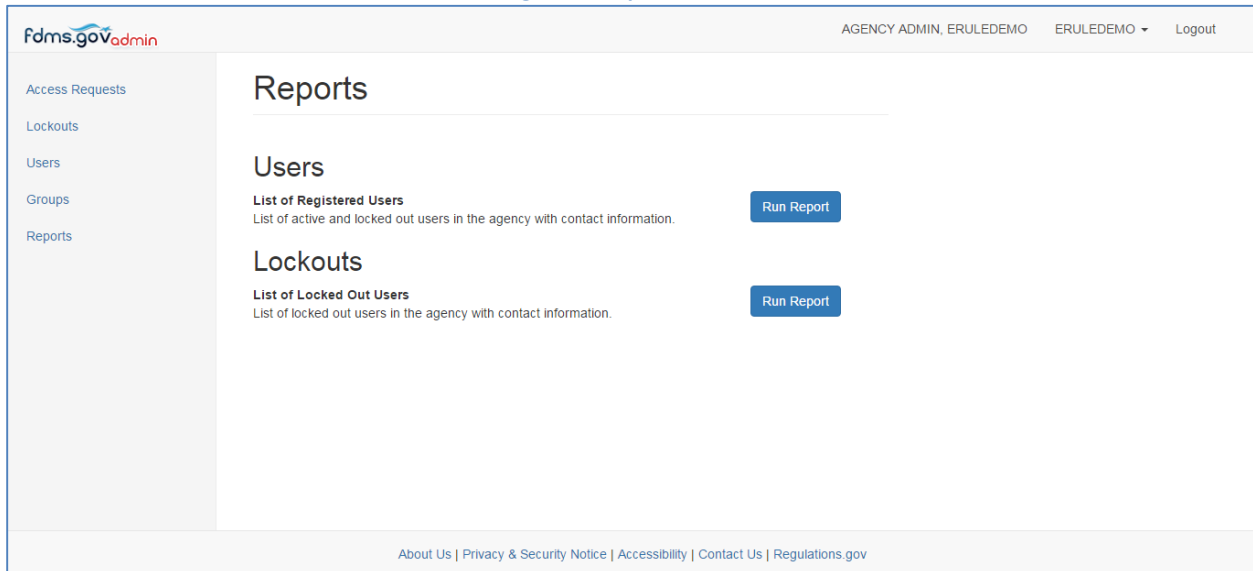Figure 6 - Resetting a Locked Account
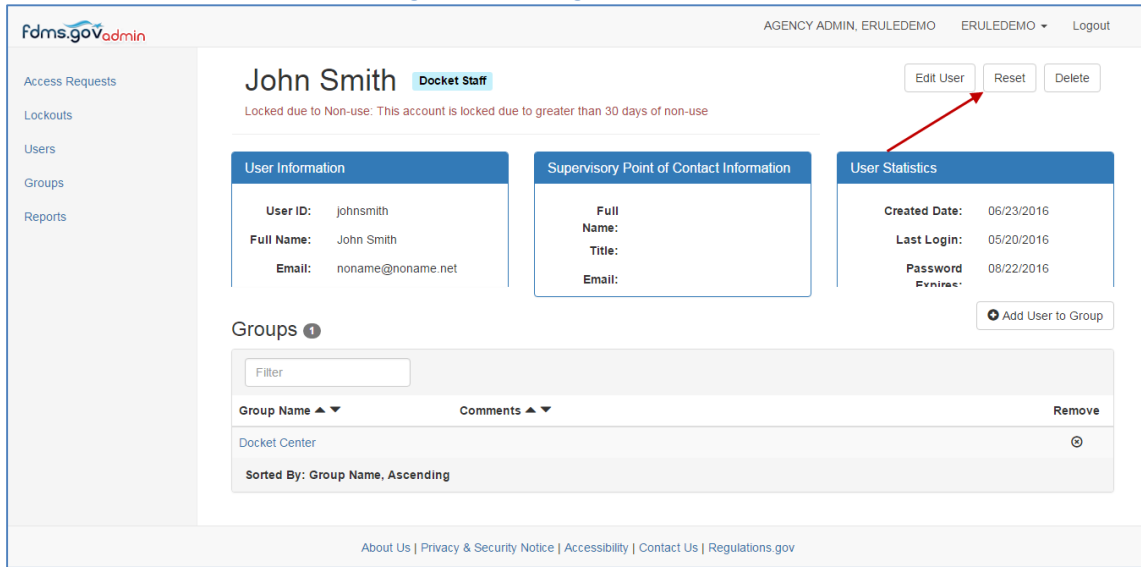
Reports

There are two *Reports* currently available in the Admin Module:

- **List of Registered Users**
  List of active and locked out users in the agency with contact information.
- **List of Locked Out Users**
 List of locked out users in the agency with contact information.

Figure 7 - Reports Screen

The *Run Report* button to the right of each *Report* generates a pop-up asking the user whether they would like to save the *Report*. Choosing *Ok* opens a CSV file which can be saved externally.

The default file name for each report contains the agency acronym, the report that the user selected, and a timestamp for ease of reference.
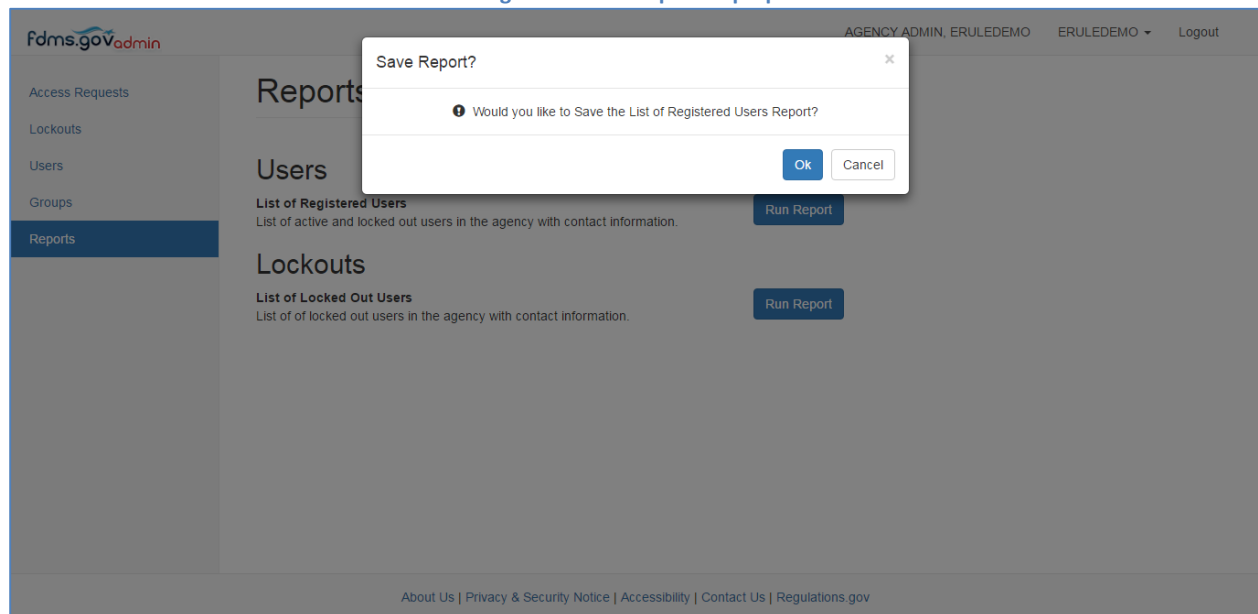
List of Registered Users Report

The *List of Registered Users Report* allows Agency Administrators to export a full list of users within their Agency which includes the contact information for each user, the status of their account, and access statistics. The *Report* provides the Agency Administrator with a CSV file containing the following columns:

- Agency
- User ID
- Last Name
- First Name
- Middle Name
- Email
- Phone Number
- Role
- Account Status
- Last Login
- Password Last Changed

List of Locked Out Users Report

The *List of Locked Out Users Report* allows Agency Administrators to save a list of users within the Agency with a locked *Account Status*. The CSV file contains the same columns as the *List of*

Registered Users Report. The *Account Status* column will only include Locked accounts. *Active* accounts are not included in this report.

Secondary User Accounts

Switching Between Secondary Agency Administrator Accounts

Agency Administrators with one or more *Secondary User Accounts* that are also granted Agency Administrator access can choose which of those agencies they would like to view from a dropdown list in the upper right hand corner of the application.

Figure 9 - Switching Between Secondary Agency Administrator Accounts

Add Secondary User

The *Add Secondary User* button allows Agency Administrators to create a *Secondary User* in their Agency from the list of users in any relevant Sub-Agency. A *Secondary User* can be added with the role of Docket Manager, Rule Writer, Docket Staff or Agency Viewer. In order to add a *Secondary User* with the role of Agency Administrator, please contact the FDMS Help Desk for assistance.

Figure 10 - Add Secondary User Button

A drop-down with the associated Sub-Agencies is shown along with a list of users from those Sub-Agencies and their primary *User Roles*.

Figure 11 - Secondary User Selection Screen

Clicking on a *User ID* displays the *Add Secondary User* confirmation screen. An Agency Administrator must select the *Access Level* for the *Secondary User*.

Figure 12 - Secondary User Confirmation Screen

View/Edit Secondary User

After an Agency Administrator adds a *Secondary User*, the *Secondary User* shows in the Agency *Users* list. The *User ID* for a *Secondary User* is the original *User ID* appended with the parent agency acronym.

Figure 13 - Secondary Users in User List

Clicking on the *User ID* for the *Secondary User* from the *Users List* displays an *Edit Secondary User* screen where an Agency Administrator can view the *User Information* and change the *Access Level* if desired.

Figure 14 - Edit Secondary User Screen

Delete Secondary User

Agency Administrators have the ability to delete a *Secondary User* from their Agency by clicking the *Delete* button on the *User Information* page.

Figure 15 - Delete Secondary User Option

Similar to any Agency account deletion, the Agency Administrator must select another user to replace the assignments for the user they wish to delete.


Figure 16 - Delete Secondary User Reassignment Screen

The deletion confirmation screen provides the Agency Administrator with a summary of the requested deletion and reassignment actions. Clicking the *Delete* button will delete the *Secondary User* account, however, the user's primary account will remain. In order to remove a user from the system completely, an Agency Administrator in that user's primary Agency must delete the primary account.

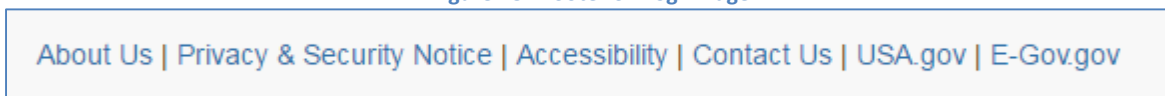Figure 17 - Delete Secondary User Confirmation Screen
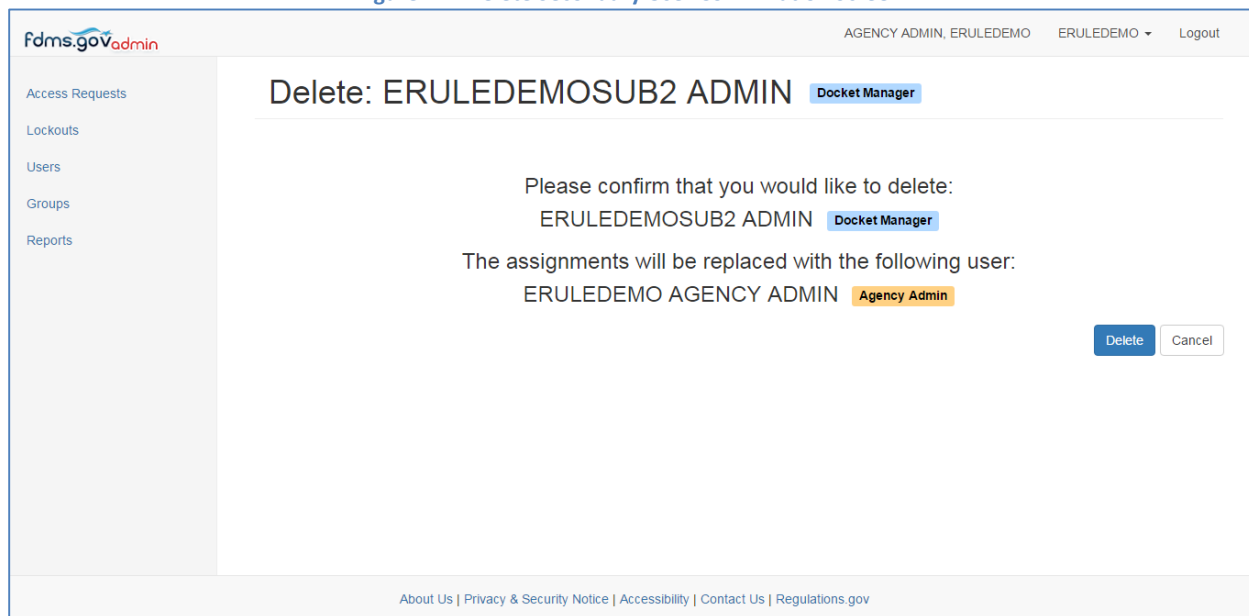
Footer

Login Page

The footer on the login page contains the same footer items that are accessible from the login page of FDMS 4.

Figure 18 - Footer on Login Page

After Authentication

The footer after a user is logged into the system provides a subset of the footer links available after login in FDMS 4. The footer in FDMS 4 contains the following additional items that will be implemented in a future release of the Admin Module: FAQs, Glossary, Resource Center and Training.

Figure 19 - Footer after Authentication

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Known Issues

There are no Known Issues to report as a result of this release.